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Quarterly Management Review Process

OBJECTIVE

The Quarterly Management Review (QMR) is to provide a project review forum for the Executive Committee. Its primary purpose is to surface significant project problems to senior Agency management so that they may have the opportunity to collectively address the issues involved and to participate in suggested solutions and alternate courses of action.

AGENDA DEVELOPMENT

Topics for the QMR agenda may be submitted by the Deputy Directors, Executive Director, DDCI, or DCI. Those projects which cross directorate lines should be included for consideration as agenda items as well as troubled projects which adversely impact on the Agency's current or future operational capacity. All projects which total [   ] 25X1 fiscal years will be considered for inclusion on the agenda at least twice a year.

Each QMR agenda must also include those projects with unresolved issues from the previous QMR meeting. With these contributions submitted by the responsible senior managers, the QMR agenda will be prepared by the Executive Committee staff.

PRESENTATION

Presentations at the QMR meetings will be made by the individuals directly responsible for the project (e.g., the program manager or the chief of the organization in which the problem is actually occurring).

The time allotted for a specific presentation will be 10 minutes, and will focus on issues or problems. Background information required for a better understanding of the topics will be provided to the Executive Committee staff so that it can distribute the information one week before the QMR meeting.

Background material will be furnished according to the following format (examples attached):

Tab A - FUNDING PROFILE The Funding Profile is a critical element of the QMR. Financial activity frequently affects other problems, particularly schedules. Therefore, it is absolutely essential that a thorough, coordinated profile be prepared for the QMR. Insufficient funds, i.e., "SHORTFALLS," must be addressed in the QMR narrative input and in the presentation, including status of actions to resolve discrepancies or to identify funding.

The following definitions apply to terms used on the "FUNDING PROFILE" display:

a. PRIOR YEARS: Actual expenditures.

b. APPROVED: Current fiscal year approved funding.

c. BASELINE ESTIMATE: This is the estimated total cost of RDT&E or procurement starting with the first year the effort was included in the approved budget.

d. ACTUAL/APPROVED: This includes the effects of all program changes to date (quantities, schedules, inflation, technical characteristics, etc.)

e. PROGRAM MANAGER ESTIMATE: This includes ACTUAL/APPROVED plus any new changes that are not reflected in the program (cost overruns, additional quantities required, new requirements, technical problems, etc.)

Tab B - SCHEDULE PROFILE The Schedule Profile must include a brief definition of the activities planned with a projected schedule of major or critical milestones. The report will include any slippages in these milestones with information concerning the cause, particularly those related to contractor nonperformance or misperformance. It will also address other issues such as technical problems, difficulties in performing tasks because of new technology, loss of key personnel, management problems, misaligned priorities that result in a slowing or a lack of progress, etc.

Tab C - PERSONNEL PROFILE The Personnel Profile identifies the authorized and assigned staff and contractor strength of program personnel, the program management offices estimates, if applicable, and any shortfalls of personnel.

FOLLOW-UP ACTIONS AND SUBSEQUENT REPORTING

The Executive Committee report will include action items with specific responsibilities assigned. All actions should be completed by the deadline provided.

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(X)- Completed on Schedule

Office:
Objective Statement:

Date Submitted:

Fiscal Year ___1982___

Activities Planned	Quarter 1				Quarter 2				Quarter 3				Quarter 4			
	OCT	NOV	DEC		JAN	FEB	MAR		APR	MAY	JUN		JUL	AUG	SEP	
1. Define System Output	—(X)															
2. Finalize Contract			(X)													
3. System Definition					O------X											
4. Document Preparation									O							
5. Preliminary System Design													O			
6. Detailed System Design														O		

ISSUES:
3. Contractor underestimated manpower required to meet systems definition on schedule.

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